

US FEDERAL CONTRACT

User Guide



Table of Contents

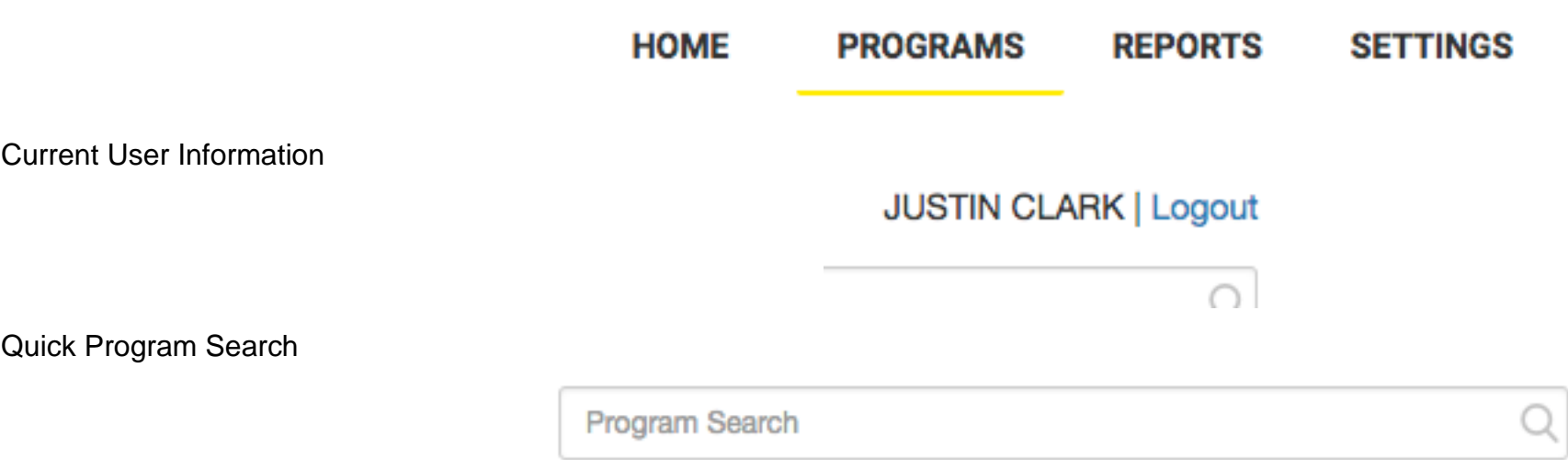
1	<u>STRUCTURE OF THE APPLICATION</u>	3
0.1.	HEADER	3
	MENU	3
	CURRENT USER INFORMATION	3
	QUICK PROGRAM SEARCH	3
0.2.	SECTION EDITOR	3
0.3.	TOOL BAR	3
0.4.	PAGINATION	3
0.5.	FOOTER	3
2	<u>UNDERSTANDING THEHOMEPAGE</u>	4
2.1	RECENTLY UPDATED	4
2.2	RECENTLY CREATED	4
2.3	RECENTLY VIEWED	4
2.4	ADVANCE SEARCH	5
3	<u>HOW TO SEARCH AND VIEW A PROGRAM?</u>	5
3.1	SEARCHING A PROGRAM	5
3.1.1	FILTERS	5
3.1.2	LISTOFPROGRAMS	5
3.2	VIEWING A PROGRAM	5
3.2.1	GENERAL TAB	6
3.2.2	AFFILIATIONS TAB	7
3.2.3	CONTACTS TAB	8
3.2.4	FINANCIALS TAB	8
3.2.5	TERMS & CONDITIONS TAB	8
3.2.6	HISTORY & CONTRACT MODS TAB	8
3.2.7	DOCUMENTS TAB	9
3.2.8	ORDERS TAB	9
3.3	HOW TO VIEW AN ORDER?	9
3.4	HOW TO VIEW AN ORDER MOD?	11
4	<u>HOW TO DOWNLOAD THE DETAILS OF A PROGRAM?</u>	12
4.1	DOWNLOADING A PROGRAM	12
4.2	DOWNLOADING DETAILS OF AN ORDER	12
5	<u>REPORTS</u>	13
5.1	HOW TO DOWNLOAD THE FINANCIAL REPORT?	13
5.2	HOW TO DOWNLOAD ORDER MODIFICATION REPORT?	13
5.3	HOW TO DOWNLOAD TERMS & CONDITIONS REPORT?	14
5.4	HOW TO DOWNLOAD PHASE REPORT?	14
5.5	HOW TO DOWNLOAD PHYSICALLY COMPLETED REPORT?	15
6	<u>HOW TO MODIFY A PROGRAM?</u>	15
	PROGRAM EDITOR	15
6.1	GENERAL TAB	16
6.2	CONTACTS TAB	17
6.3	FINANCIALS TAB	18
6.4	TERMS & CONDITIONS TAB	18
6.5	HISTORY & CONTRACT MODS TAB	18
7	<u>HOW TO ADD A PROGRAM?</u>	19
8	<u>HOW TO ADD AN ORDER TO A PROGRAM?</u>	19
9	<u>HOW TO ADD A MODIFICATION TO AN ORDER?</u>	20
10	<u>HOW TO UPLOAD A NEW DOCUMENT TO A PROGRAM?</u>	21
11	<u>HOW TO REMOVE A PROGRAM?</u>	22
12	<u>HOW TO MANAGE DATA IN AUTO COMPLETE FIELDS ?</u>	22
12.1	MANAGING USERS	22
12.1.1	VIEWING LIST OF USERS	22
12.2	MANAGING CONTACTS	22
12.2.1	VIEWING CONTACTS	22
12.2.2	HOW TO ADD A NEW CONTACT?	22
12.3	MANAGING PLACES	23
12.3.1	VIEWING PLACES	23
	APPENDIX	24
	• ADVANCE FILTER OPTIONS	24
	• PROGRAM PHASES	24
	• CONTRACT TYPES IN A PROGRAM	24
	• SERVICE OFFERINGS IN A PROGRAM	24
	• CORPORATE CAGE CODES	24
	• CORPORATE LOCATIONS	24
	• AFFILIATION TYPES	24
	• CONTACT TYPES	25
	• TERMS AND CONDITIONS	25
	• ORDER SCOPE	25
	• ORDER TYPE	25

1 Structure of the Application

Following are the elements of the application.

1.1. Header

Menu



The search bar helps you search program and switch to it.

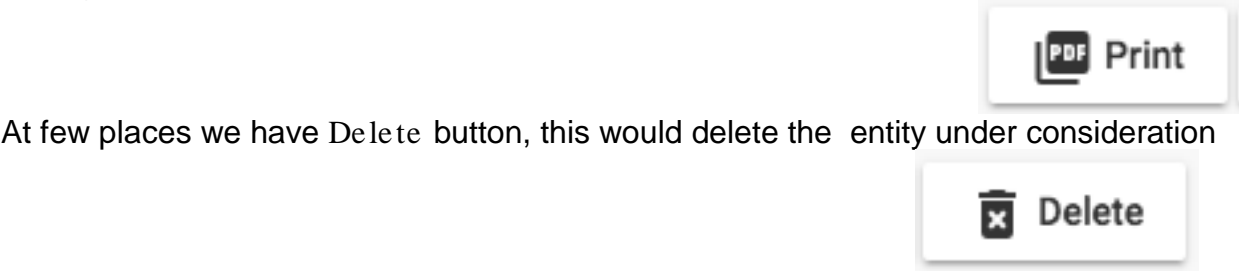
1.2. Section Editor

Each section has an edit button. Use it to change values within that section. Once done you can save it or revert back the changes



1.3. Tool bar

A program and order can be downloaded in PDF format. Use the Print button to download it.



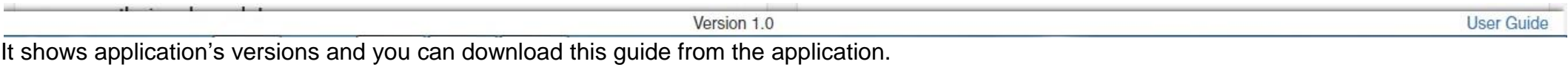
At few places we have Delete button, this would delete the entity under consideration

1.4. Pagination

The lists are supported with pagination at the bottom; use it navigate between the pages



1.5. Footer



It shows application's versions and you can download this guide from the application.

2 Understanding the homepage

It has list of programs grouped by recent actions

- 1. Name of the program
- 2. Date when the program was updated
- 3. Navigate to program

2.1 Recently Updated

It shows top 5 programs that have been recently updated by anyone in the application

RECENTLY UPDATED		
#	Name 1	Updated On 2
1	Defence and Security Accelerator	May 24, 2017
2	Counter-proliferation 3	May 24, 2017
3	Domestic Programme	May 24, 2017
4	Cross-Government Prosperity Fund Programme	May 24, 2017
5	Domestic Programme Fund	May 24, 2017

2.2 Recently Created

It shows top 5 programs that have been recently created by anyone in the application

RECENTLY CREATED		
#	Name 1	Created On 2
1	Broadband Delivery	May 23, 2017
2	Domestic Programme Fund 3	May 18, 2017
3	State Children's Insurance	Apr 26, 2017
4	Cross-Government Prosperity Fund Programme	Apr 25, 2017
5	Domestic Programme	Apr 25, 2017

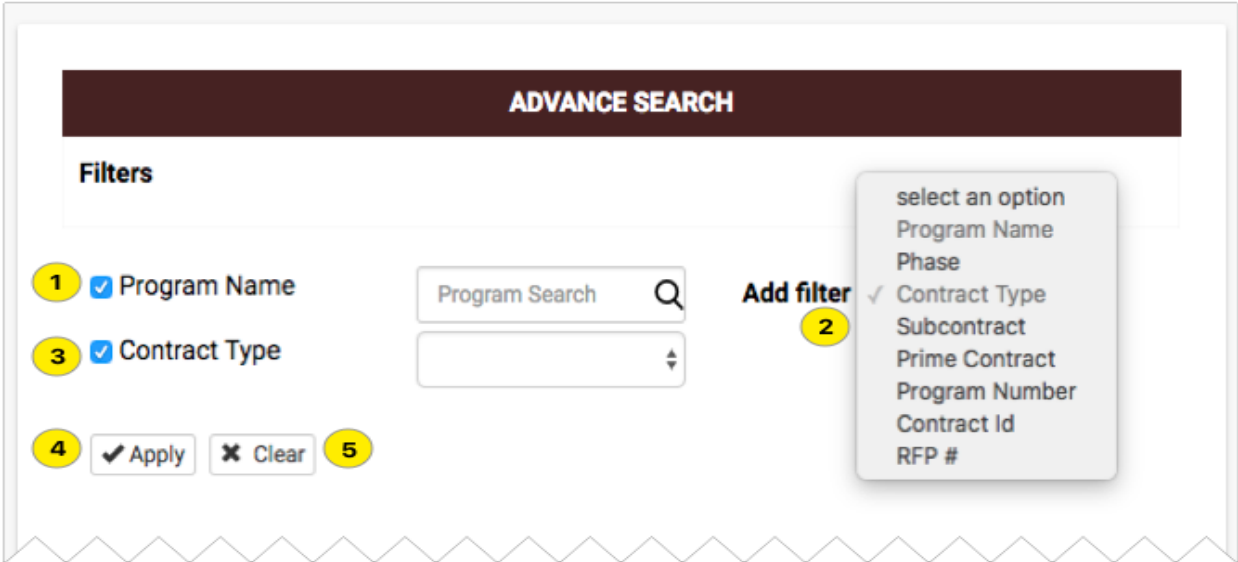
2.3 Recently Viewed

It shows list of last 5 programs you have viewed

RECENTLY VIEWED		
#	Name 1	Viewed On 2
1	Broadband Delivery 3	May 24, 2017
2	Defence and Security Accelerator	May 24, 2017
3	Counter-proliferation	May 24, 2017
4	Domestic Programme	May 24, 2017
5	Cross-Government Prosperity Fund Programme	May 24, 2017

2.4 Advance Search

Using this you should be able to drill down to specific set of programs



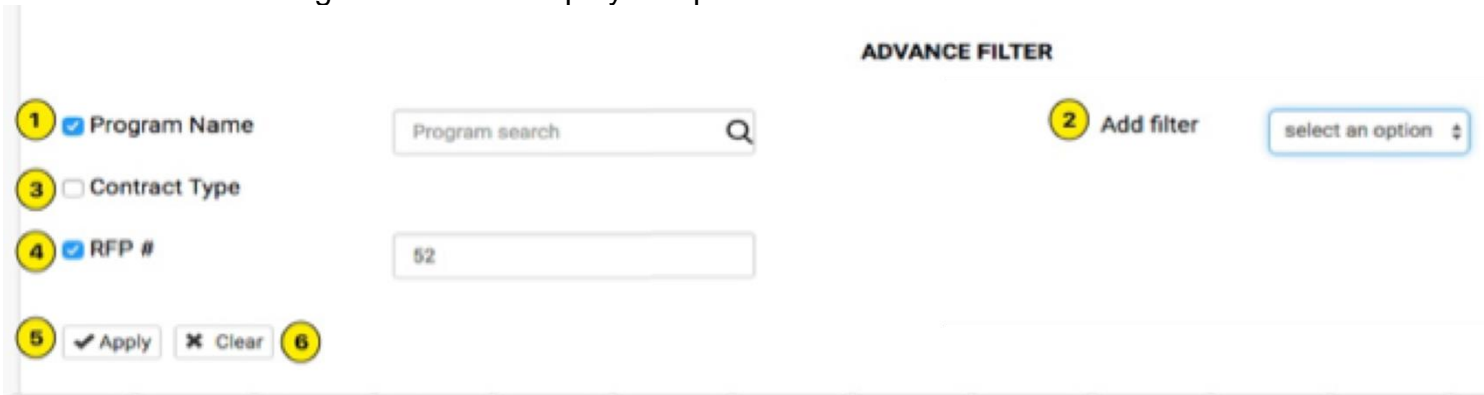
- 1. Program Name- - the default filter; you can deselect it
- 2. use it to add more filters
- 3. Newly added filter
- 4. Apply –button to get the results.
- 5. Clear –to reset values of filter(s)

3 How to search and view a Program?

3.1 Searching a program

3.1.1 Filters

There are Filters in Program Tab that helps you input different attributes to search for



- 1. Default filter
- 2. Use it to add more filters
- 3. Additional unselected filter
- 4. Another selected filter
- 5. Apply – button to get the results.
- 6. Clear - to reset values of filter

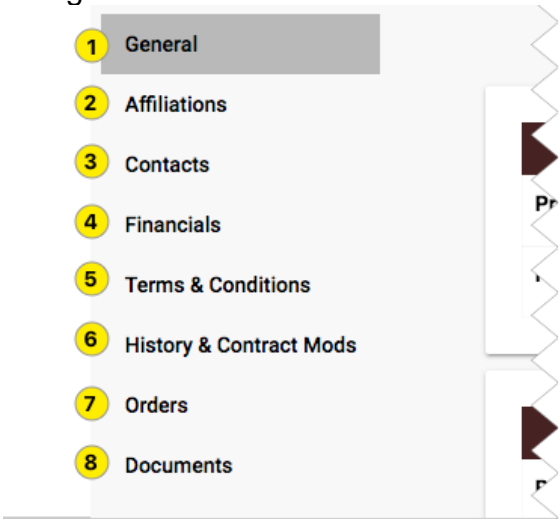
3.1.2 Listofprograms

PROGRAMS	
#	Name
1	Broadband Delivery
2	Domestic Programme Fund
3	State Children's Insurance
4	Cross-Government Prosperity Fund Programme
5	Domestic Programme
6	Counter-proliferation
7	Army Federal Program

- 1. Name of program
- 2. Click on any program to show detail

3.2 Viewing a program

A program’s details have been segregated into following 8 tabs



- 1. General
- 2. Affiliations
- 3. Contacts
- 4. Financials
- 5. Terms & Conditions
- 6. History & Contract Mods
- 7. Orders
- 8. Documents

9.

3.2.1 General Tab

It has following sections

General Information

GENERAL INFORMATION			
1 Program Number:	103483	Program Name:	5 State Children's Insurance_test
2 Phase:	Active	Inventoried By:	6 John Smith
3 Awarding Agency:	Army Contractor Agency	Awarding Office:	7 Cooperative Studies Program (CSP)
4 Department of Records Coordinator (DRC):	UM System	Prime Contractor:	8 William Beth

- 1. Auto generated program number
- 2. Phase
- 3. Awarding Agency
- 4. Department Of Records Coordinator -
- 5. The program name
- 6. Inventoried By
- 7. Awarding Office
- 8. Prime Contractor

Summary Information

SUMMARY INFORMATION			
1 RFP #:	32568	2 Letter Contract #:	a85791
3 Prime Contract #:	OoD-2345	4 Contract Id #:	35894
5 Role:	Prime	6 Subcontract #:	35894.12

- 1. RFP#
- 2. Letter Contract #
- 3. Prime Contract #
- 4. Contract Id#
- 5. Role
- 6. Subcontract #

Contract Types

CONTRACT TYPES	
# Contract Type	1
1	Time & Material
2	Cost Plus Incentive
3	Firm Fixed Price

- 1.It can take multiple values

Primary Place of Performances

PRIMARY PLACE OF PERFORMANCES	
# Places	1
1	Arkansas
2	California
3	Delaware

- 1. Multiple Places

Award Basis

AWARD BASIS			
1 Award Basis:	Multiple	2 If task/delivery orders then competition is:	Discretionary

- 1. Multiple or Single
- 2. can be one of
 - a. Discretionary
 - b. None
 - c. Required

Service Offerings

SERVICE OFFERINGS	
# Service Offering	1
1	Applications Maintenance
2	Health Care Finance Administration (HCFA)
3	Business Continuity

- 1. can be one of the service offerings

Corporate Identifier

CORPORATE IDENTIFIER			
1 CAGE Code:	0CVK8	2 Corporate DUNS:	07-781-7617
3 Corporate Location:	225 Grandview Ave, Camp Hill, PA		

- 1. One of the CAGE Codes
- 2. Corporate DUNS attached with CAGE code
- 3. One of the Corporate Location

Renewal

RENEWAL			
1 Current Term Expires On:	May 31, 2017	2 Next notice of intent due by:	May 17, 2018
3 Valid exercise requires (day[s] notice):	3		

- 1. Date of Current Term Expiration
- 2. Due date of Next notice of intent
- 3. Day(s) of notice required for valid exercise

Dates

DATES			
1 Award Date:	May 24, 2017		
2 Maximum Term Start Date:	May 25, 2017	3 Maximum Term End Date:	May 31, 2017
4 Base Period Start Date:	May 31, 2017	5 Base Period End Date:	May 31, 2018

- 1. Award Date
- 2. Maximum Term Start Date
- 3. Maximum Term End Date
- 4. Base Period Start Date
- 5. Base Period End Date

Option Periods

OPTION PERIODS			
#	Number 1	Start Date 2	End Date 3
1	12558	May 24, 2017	May 31, 2017
2	12885	Jun 4, 2018	Jun 29, 2018

- 1. Number
- 2. Start Date
- 3. End Date

Procurement Regulations

PROCUREMENT REGULATIONS		
#	Regulation 1	Notes 2
1	NASA	Notes
2	DFARS	Notes

- 1. Regulation
 - a. FAR
 - b. NASA
 - c. DFARS
 - d. Other
- 2. Notes

Owners

OWNERS		
#	Owner 1	Type 2
1	Justin Clark	Finance
2	Newm	Legal

- 1. Owners
- 2. Type

3.2.2 Affiliations Tab

AFFILIATIONS		
#	Affiliation Type 1	Program Name 2
1	IS THE SAME ISS	Army Federal Program 3
2	IS A RELATED CL	Federal 1
3	IS A CROSS REFE	Newfederal

- 1. Affiliation Type
- 2. Program Name
- 3. Click on any program to detail.

3.2.3 Contacts Tab

CONTACTS		
#	Type 1	Contact 2
1	Awarding Agency	Federal
2	Payment Office	Thomson Brett

1. Type
- a. Awarding agency

b. Govt. POC

c. Contractor

d. Payment Office
2. Contact

3.2.4 Financials Tab

It has following sections

Financial Control data

FINANCIAL CONTROL DATA	
1 Responsibility Center:	Journal of Higher Policy

1. Responsibility Centre

Payment Information

PAYMENT INFORMATION	
1 Payment Office:	Andrew Flintop
2 Special Billing Provisions:	None

1. Payment office
2. Special Billing Provisions

Mechanics

MECHANICS			
1 Authorized Users:	Albert	2 Contract Ordering:	Centralized

1. Authorized Users
2. Contract Ordering
- a. Centralized

b. Decentralized

c. General

d. INS

Financial

FINANCIAL		
1 Original Estimated Lifecycle Contract Value:		\$9,000.00
2 Current Estimated Lifecycle Contract Value:		\$16,000.00
3 Current Obligated Funds:		\$5,000.00

1. Original Estimated Lifecycle Contract Value
2. Current Estimated Lifecycle Contract Value
3. Current Obligated Funds

3.2.5 Terms & Conditions Tab

TERMS & CONDITIONS			
1 Name	2 Description	3 Date	
1 Service Contract Act	Notes	May 24, 2017	
2 Economic and MOnetary Union (EMU) Compliance	Notes	May 31, 2017	

1. Name
2. Description
3. Date

3.2.6 History & Contract Mods Tab

It has following sections

History

HISTORY			
1 Date	2 Last Modified By	3 Description	
1 May 24, 2017	Brait Lee	Notes	
2 May 25, 2017	Justin Clark	Notes	

1. Date
2. Last Modified By
3. Description

Show Cause/ Cure Notice

SHOW CAUSE / CURE NOTICE			
1 Show Cause / Cure Notice:	NO	2 Show Cause / Cure Notice Date:	May 31, 2017
3 Actions:	Initial		

1. Show Cause / Cure Notice
2. Show Cause / Cure Notice Date
3. Actions

Contract Mods

CONTRACT MODS	
#	Name 1
1	876 5/24/2017 2
2	876 5/24/2017

1. Name - Which contains list of contract mods
2. If user click on any name, then user will get the detail

3.2.7 Documents Tab

It shows files organized into folders

DOCUMENTS FOLDERS

Funds

Legal

New Folder

DOCUMENTS

Name	Size	Type	Time	Date
Affiliations	49kb	png	7:11 PM	May 24, 2017
user-guide	1311kb	docx	7:11 PM	May 24, 2017
user-guide	2309kb	pages	7:10 PM	May 24, 2017

- 1. Folder
- 2. New Folder

- 1. Name
- 2. Size
- 3. Type
- 4. Time
- 5. Date

3.2.8 Orders Tab

Each program has the list of order; use it to navigate through them

List

ORDERS			
#	Name	Type	Effective Date
1	22151	Firm Fixed with EPA	May 31, 2017
2	125698	Cost Plus Incentive	Jun 15, 2017

- 1. Orders Name
- 2. Type
- 3. Effective Date

3.3 How to view an Order?

To view an order from Order tab click on the respective Order Name. The order details page will appear in which the order’s attributes are organized into following sections

Details

DETAILS

Order Name

22151

Order Type

Firm Fixed With EPA

Pop From

May 24, 2017

Proposal Date

May 25, 2017

Customer

Michel

Description

Notes

Scope

Center Outsourcing

Effective Date

May 31, 2017

Pop To

Jun 14, 2017

Resp Center

Scotiabank

- 1. Orders Name
- 2. Scope
- 3. Order Type
- 4. Effective Date
- 5. Pop From
- 6. Pop To
- 7. Proposal date
- 8. Resp Center
- 9. Customer
- 10. Description

Financials

FINANCIALS

Fixed Price Cumulative

\$10,000.00

Fee Cumulative

\$1,000.00

Obligated Amount

\$5,000.00

Amount

\$100,000.00

Percentage (%)

50

Cost Cumulative

\$5,000.00

Total Cumulative

\$16,000.00

Limit of Funds

Notification

Jun 14, 2017

- 1. Fixed Price Cumulative
- 2. Cost Cumulative
- 3. fee Cumulative
- 4. Total Cumulative
- 5. Obligated Amount
- 6. Limit of Funds Amount
- 7. Limit of Funds Notification
- 8. Limit of Funds Percentage

Decentralized Order

DECENTRALIZED ORDER	
1 Payment Office	Federal
2 Contract Administrator	Andrew Flintop
3 Contract Admin Backup	Thomson Brett

- 1. Payment Office
- 2. Contract Administrator
- 3. Contract Admin Backup

Contracting Officer

CONTRACTING OFFICER	
#	Name 1
1	Federal
2	Michel Clark

- 1. Name of Contracting Officer

Account Manager

ACCOUNT MANAGER	
#	Name 1
1	Michel Clark
2	Andrew Flintop

- 1. Name of Account Manager

Security

SECURITY	
1 <input checked="" type="checkbox"/> Required	
2 Security Requirement Notes	Notes

- 1. Required
- 2. Security Requirement Notes

Modifications

MODIFICATIONS		
#	Name 1	Effective Date 2
1	3452352	Jun 30, 2017

- 1. Name
- 2. Effective Date

3.4 How to view an Order Mod?

To view an “Order Mod” click on the respective Mod Order Name from the “Order”Modifications section. The attributes are organized into following sections

Details

← Modification - 3452352 of 22151 9

DETAILS			
1 Name	3452352	2 Scope	Certification And Deployr
3 Order Type	Cost Sharing	4 Change Type	Bilateral
5 Pop From	Jun 5, 2017	6 Pop To	Jun 6, 2017
7 Proposal Date	May 31, 2017	8 Effective Date	Jun 30, 2017

- 1. Orders Name
- 2. Scope
- 3. Order Type
- 4. Change Type
- 5. Pop From
- 6. Pop To
- 7. Proposal date
- 8. Effective Date
- 9. Back to list

Financials

FINANCIALS		
Field 1	Amount 2	Adjustment 3
Fixed Price	\$10,000.00	Plus
Cost	\$5,000.00	Plus
Fee	\$1,000.00	Plus
Obligated	\$5,000.00	Plus

- 1. Fields
- 2. Amount
- 3. Adjustment

Changes Made

CHANGES MADE	
1 Add/Change Funding Data	
2 Administrative Change	
3 Change PoP	

- 1. Add/ Change Funding Data
- 2. Administrative Change
- 3. Change Pop

4 How to download the details of a Program?

4.1 Downloading a program

A program can be downloaded in PDF format.

- 1. Use the Print button on the details screen to download it.

← DOMESTIC FUND CONTRACT

1

Print

Delete

GENERAL INFORMATION

Edit

PROGRAM - STATE CHILDREN'S INSURANCE_TEST				
GENERAL INFORMATION				
Program Number :	103483		Program Name:	State Children's Insurance test
Phase:	Active		Inventoried By:	John Smith
Awarding Agency:	Army Contractor Agency		Awarding Office:	Cooperative Studies Program (CSP)
Department of Records Coordinator (DRC):	UM System		Prime Contractor:	William Beth
SUMMARY INFORMATION				
RPF #:	6545-5456asd		Letter Contract #:	2999-5454sad
Prime Contract #:	464-5445sed		Contract Id #:	566-8787sd
Role	Prime		Sub Contract #:	6656
CONTRACT TYPES				
SNo.	Contract Type			
1	Grant			
2	Firm Fixed Incentive			
PRIMARY PLACE OF PERFORMANCES				
SNo.	Places			
1	Hawaii			
2	Washington			
AWARD BASIS				

The PDF format of program

4.2 Downloading details of an order

An Order can be downloaded in PDF format.

- 1. Use the Print button on the order details screen to download it.

PROGRAM- COUNTER-PROLIFERATION

← Order - 289

1

Print

Del

DETAILS

Edit

Order Name - 1398				
Details				
Order Type :	Cost Sharing		Scope :	Program management
Pop From :	Apr 26, 2017		Pop To :	Apr 27, 2017
Effective Date :	Apr 26, 2017		Resp Center :	test
Proposal Date :	Apr 19, 2017		Customer :	Michel Clark
Description :	Used for testing			
Financial				
Fixed Price Cumulative :	\$22,545,655.00		Cost Cumulative :	(\$4,454,567.00)
Fee Cumulative :	\$456,456,787.00		Total Cumulative :	\$474,547,875.00
Obligated Amount :	(\$44,545,678.00)			
Limits Of Funds				
Amount :	\$45,000.00		Notification :	Apr 27, 2017
Percentage(%) :	44			

The PDF format of an order

5 Reports

Reports has been segregated into following 4 tabs



- 1. Financial report
- 2. Order Modification Report
- 3. Terms & Conditions Report
- 4. Phase Report
- 5. Physically Completed Report

5.1 How to download the Financial Report?

Get the financial attributes of programs across application which can be exported to excel.

Taking an example where in you are looking for programs with Original Estimated Lifecycle Contract Value greater than \$ 100.

Step 1: Key in original estimated lifecycle contract value you are looking for and click “Submit” button

- 1. Original Estimated Lifecycle Contract Value
- 2. Current Estimated Lifecycle Contract Value
- 3. Current Obligated Funds
- 4. Submit
- 5. Reset

Step 2View the report and click the “Export” button to download

	Greater than	Less than
1 Original Estimated Lifecycle Contract Value	\$100.00	\$50,000.00
Current Estimated Lifecycle Contract Value	\$100.00	\$10,000.00
Current Obligated Funds	\$100.00	\$10,000.00

#	Program Name 2	Estimated Life Contract Value 3		Current Obligated Funds 4
		Original	Current	
1	Domestic Programme	\$5,000.00	\$5,400.00	\$1,000.00

- 1. Original Estimated Lifecycle Contract Value
- 2. Program Name
- 3. Estimated Lifecycle Contract Value
- 4. Current Obligated Funds
- 5. Reset
- 6. Use the export button to download it in excel format

5.2 How to download Order Modification Report?

Gets list of Mod Order of the selected order(s)

Step 1 Select a program, all orders for the program will appear. Then select the respective order(s) and click “Submit” button

- 1. Program
- 2. Order Names
- 3. Check box
- 4. Submit
- 5. Reset

Step 2View the report and click the “Export” button to download

ORDER MODIFICATION REPORT

1

Program:

Broadband Delivery

Prime Contract Number:

OoD-2345

Award Date:

May 24, 2017

Maximum Term Start Date:

May 25, 2017

Maximum Term End Date:

May 31, 2017

2

Order: 22151

3

Order Mod #	Order Type	Effective Date	Pop From	Pop To	Obligated Amount	Fixed Price Amount	Cost Amount	Fee Amount	Total Amount
3452352	Cost Sharing	Jun 30, 2017	Jun 5, 2017	Jun 6, 2017	\$5,000.00	\$10,000.00	\$5,000.00	\$1,000.00	\$16,000.00

1. Program
2. Order no.
3. Order modification Fields
4. Use the export button to download it in excel

5.3 How to download Terms & Conditions Report?

Gets list of terms & conditions)

Step 1 Select multiple terms you are looking for and click “Submit” button

TERMS & CONDITIONS REPORT

Select

Terms

1

2

☐

Buy American Act/Trade Agreement Act

☐

Cancellation Provisions

☐

Caps On Indirect Rates

☐

CAS Clauses (FARs 52.230-1 thru 52.230-6)

☐

CAS Clauses FAR 52.230-1

☐

CAS Clauses FAR 52.230-2

3

Submit

Reset

4

1. Terms
2. Select multiple Terms
3. Submit
4. Reset

Step 2 View the report and click the “Export” button to download

TERMS & CONDITIONS REPORT

1	SNo.	2	Program Number	3	Program Name	4	Contract Type	5	Prime Contract Number	6	Sub Contract Number	7	Start Date	8	End Date	9	Funding	10	Terms
	1	0000001.103557	Cross govt. funds	Cost Reimbursable	2546232	556-212	Jun 21, 2017	Jun 22, 2017										Caps On Indirect Rates, CAS Clauses FAR 52.230-6, Year 2000 Compliance, Corp. Risk	
	2	103480	Security Programme funds	Cost Plus Award Fee	655-5444	6656-445	Apr 6, 2017	Apr 12, 2017								34545		Caps On Indirect Rates	
	3	103538	MayCM June 5	Cost Sharing	2562-254	235-6653	Aug 1, 2017	Aug 17, 2017								-5000		Buy American Act/Trade Agreement Act	

1

Previous

Next

1. Sno.
2. Program Number
3. Program Name
4. contract Type
5. Prime contract Number
6. Sub Contract Number
7. Start Date
8. End Date
9. Funding
10. Terms

5.4 How to download Phase Report?

Step 1: Select multiple phases you are looking for and click “Submit” button

PHASE REPORT

Select

Phases

1

2

☒

Active

☒

Approved

☐

Approved (Pending)

☐

Canceled

☐

Cancelled (Pending)

☐

Class

3

Submit

Reset

4

1. Phase
2. Select Multiple phases
3. Submit
4. Reset

Step 2View the report and click the “Export” button to download

PHASE REPORT														
1 SNo.	2 Program Number	3 Program Name	4 Contract Ty	5 Awarding Agency	6 Prime Contractor	7 Prime Contract Number	8 Sub Contract Number	9 Cage Code	10 Start Date	11 End Date	12 Contract Value	13 Funding	14 Current Phase	15 Main Assignee
1	103480	Security Programme funds	Cost Plus Award Fee	Clark	Prime contractor	655-5444	6656-445	395E5	Apr 6, 2017	Apr 12, 2017	99211	34545	Vendor Review	

« Previous 1 Next »

1. S.No.
2. Program Number
3. Program Name
4. Contract Type
5. Awarding Agency
6. Prime Contractor
7. Prime Contract Number
8. Sub Contract Number
9. Cage Code
10. Start Date
11. End Date
12. Contract Value
13. Funding
14. Current Phase
15. Main Assignee

5.5 How to download Physically Completed Report?

Step 1: Select Order End Date you are looking for and click “Submit” button

PHYSICALLY COMPLETED REPORT

Order End Date From: 1

Order End Date Till: 2

3

Submit

Reset

4

1. Order End Date From
2. Order End Date Till
3. Submit
4. Reset

Step 2View the report and click the “Export” button to download

PHYSICALLY COMPLETED REPORT												
1 SNo.	2 Program Number	3 Program Name	4 Prime Contract Number	5 Sub Contract Number	6 Contract Start Date	7 Contract End Date	8 Order Number	9 Order Start Date	10 Order End Date	11 Order Type	12 Total Cumulative	13 Total Funding
1	0000001.103557	Cross govt. funds	2546232	556-212	Jun 21, 2017	Jun 22, 2017	order1	Jun 13, 2017	Jun 20, 2017	Cost Sharing		
2	0000001.103558	Programme	2563-2211	5623-2145	Jun 14, 2017	Jun 19, 2017	Order1	Jun 9, 2017	Jun 30, 2017	Cost Plus Award Fee	22000	10500

« Previous 1 Next »

1. S.No.
2. Program Number
3. Program Name
4. Prime Contract Number
5. Sub Contract Number
6. Contract Start Date
7. Contract End Date
8. Order Number
9. Order Start Date
10. Order End Date
11. Order Type
12. Total Cumulative
13. Total Funding

6 How to modify a program?

Program Editor

Each section has an edit button. Use it to change values within that section. Once done you can save it or revert back the changes

Edit

>

Save

Cancel

6.1 General Tab

General Information

GENERAL INFORMATION

1 Program Number:

103483

Program Name*: 5

State Children's Insurance_test

2 Phase:

Active

Inventoried By: 6

3 Awarding Agency:

Awarding Office: 7

4 Department of Records Coordinator (DRC):

Prime Contractor: 8

1. Program Number – auto generated number and cannot be edited
2. Phase
3. Awarding Agency
4. Department of records coordinator
5. Program Name – text which is used to identify the program
6. Inventoried By
7. Awarding Office
8. Prime Contractor

Summary Information

SUMMARY INFORMATION

1 RFP #:

32568

2 Letter Contract #:

a85791

3 Prime Contract #:

OoD-2345

4 Contract Id #:

35894

5 Role:

PRIME

6 Subcontract #:

35894.12

1. RFP #
2. Letter Contract #
3. Prime Contract #
4. Contract Id #
5. Role – User can take one of the following values
1. Prime
2. Subcontractor
6. Subcontract Id #

Contract Types

CONTRACT TYPES

Contract Type 1

1 Time & Material

Clear 2

2 Cost Plus Incentive

Clear

3 Firm Fixed Price

Clear

4 Select an option

Done

1. Contract Type
2. Clear - User can remove the selected contract type.

Primary Place of Performance

PRIMARY PLACE OF PERFORMANCES

Places 1

1 California

Clear

2 Place search

Done

1. Places - user can select multiple.

Award Basis

AWARD BASIS

1 Award Basis:

Multiple

If task/delivery orders then competition is: 2

DISCRETIONARY

1. Award Basis: User can take one of the following values
- Multiple

• Single
2. If task/delivery orders, then competition is:
1. Discretionary
2. None
3. Required

Service Offerings

SERVICE OFFERINGS

Service Offering 1

1 Applications Maintenance

Clear

2 Business Continuity

Clear

3 Health Care Finance Administration (HCFA)

Clear

4 Select an option

Done

1. Service Offerings

Corporate Identifier

CORPORATE IDENTIFIER

1 CAGE Code:

OCVK8

Corporate DUNS: 2

07-781-7617

3 Corporate Location:

225 GRANDVIEW AVE, CAMP HILL, PA

1. Cage Code
2. Corporate DUNS –Auto generated
3. Corporate Location

Renewal

RENEWAL

Save

Cancel

1

Current Term Expires On:

2017-05-31

Next notice of intent due by:

2

2018-05-17

3

Valid exercise requires (day[s] notice):

3

1. Current Term Expire On
2. Next notice of Intent due by
3. Valid exercise requires (day[s] notice)

Dates

DATES

Save

Cancel

1

Award Date:

2017-05-24

2

Maximun Term Start Date:

2017-05-25

Maximun Term End Date:

3

2017-05-31

4

Base Period Start Date:

2017-05-31

Base Period End Date:

5

2018-05-31

1. Award Date
2. maximum Term Start Date
3. Maximum Term End Date
4. Base Period Start Date
5. Base Period End Date

Option Periods

OPTION PERIODS

Save

Cancel

#	Number 1	Start Date 2	End Date 3	
1	12558	May 24, 2017	May 31, 2017	<div>Clear</div>
2	12885	Jun 4, 2018	Jun 29, 2018	<div>Clear</div>
3	<div></div>	<div></div>	<div></div>	<div>Done</div>

1. Number
2. Start Date
3. End Date

Procurement Regulations

PROCUREMENT REGULATIONS

Save

Cancel

#	Regulation 1	Notes 2	
1	NASA	Notes	<div>Clear</div>
2	<div>Select an option</div>	<div></div>	<div>Done</div>

1. Number
2. Start Date
3. End Date

Owners

OWNERS

Save

Cancel

#	Owner 1	Type 2	
1	Justin Clark	finance	<div>Clear</div>
2	Newdean	Legal	<div>Clear</div>
3	<div>user search</div>	<div>Select An Option</div>	<div>Done</div>

1. Owner
2. Type

Affiliations Tab

AFFILIATIONS

Save

Cancel

#	Affiliation Type 1	Program Name 2	
1	IS A COUNTER CL	State Children's Insurance	<div>Clear</div>
2	IS A RELATED CL	Cross-Government Prosperity Fund Programme	<div>Clear</div>
3	IS CONSOLIDATED	Counter-Proliferation	<div>Clear</div>
4	<div>select an option</div>	<div>Program Search</div>	<div>Done</div>

1. Affiliation Type
2. Program Name

6.2 Contacts Tab

CONTACTS

Save

Cancel

#	Type 1	Contact 2	
1	Awarding Agency	Fred	<div>Clear</div>
2	Contractor	Andrew Flintop	<div>Clear</div>
3	Payment Office	Thomson Brett	<div>Clear</div>
4	<div>Select an option</div>	<div>Contact Search</div>	<div>Done</div>

1. Type
2. Contact

6.3 Financials Tab

Financial Control Data

FINANCIAL CONTROL DATA

1 Responsibility Center:

1. Responsibility Center

Payment Information

PAYMENT INFORMATION

1 Payment Office:

Andrew

2 Special Billing Provisions:

1. Payment Office
2. Special Billing Provisions

Mechanics

MECHANICS

1 Authorized Users:

Contract Ordering:

2 Select an option

1. Authorized Users
2. Contract Ordering

Financial

FINANCIAL

1 Original Estimated Lifecycle Contract Value:

9000 \$

2 Current Estimated Lifecycle Contract Value:

\$16,000.00

3 Current Obligated Funds:

\$5,000.00

1. Original Estimated Lifecycle Contract Value
2. Current Estimated Lifecycle Contract Value
3. Current Obligated Funds

6.4 Terms & Conditions Tab

TERMS & CONDITIONS

#	Name 1	Description 2	Date 3	
1	Service Contract Act	Notes	May 24, 2017	Clear
2	Economic and Monetary Union (EMU) Compliance	Notes	May 31, 2017	Clear
3	Select an option			Done

« Previous 1 Next

1. Name
2. Description
3. Date

6.5 History & Contract Mods Tab

It has following sections

New History

NEW HISTORY

1 Date*:

Last Modified By*:

3 User Search

2 Description

1. Date
2. Last Modified By
3. Description

Show Cause / Cure Notice

SHOW CAUSE / CURE NOTICE

1 Show Cause / Cure Notice:

No

Show Cause / Cure Notice Date:

2 2017-05-31

3 Actions:

Initial

1. Show Cause/Cure Notice
2. Show Cause/ Cure Notice Date
3. Actions

New Contract Mods

NEW CONTRACT MOD

SaveCancel

1Contract Mod* #

Effective Date*2

3Change Type*:

Select an option

Comment:6

CHANGES MADE

#7Type Of Change Made

1

Select an option

Done

- 1. Contract Mod#
- 2. Effective Date
- 3. Change Type
- 4. Comment
- 5. Type of Change Made

7 How to add a program?

- Step 1:Click on “Programs” tab
- Step 2: Click the “new” button. This will open the new program form



- Step 3: Fill the details of the program.

NEW PROGRAM9SaveCancel

GENERAL INFORMATION

1Program Number:

Program number will be auto-generated

Program Name*5

2Phase:

select an option

Inventoried By:6

3Awarding Agency:

Awarding Office:7

4Department of Records Coordinator (DRC):

Prime Contractor:8

- 1. Program Number
- 2. Phase
- 3. Awarding Agency
- 4. Department of records Coordinator
- 5. Program Name
- 6. Inventoried By
- 7. Awarding Office
- 8. Prime Contractor
- 9. Save /Cancel

The fields to be filled are the one on the General Tab

- Step 4: Click on save button.
- New program will be created and saved

8 How to add an order to a program?

- Step 1:View the program to which order needs to be added
- Step 2: Navigate to the order tab
- Step 3: Click the “new” button. This will open the new order form
- Step 4: fill following sections

Details

NEW ORDERSaveCancel

DETAILS

1Order Name*:

Scope:2

select an option

3Order Type:

select an option

Effective date:4

5Pop From:

Pop To:6

7Proposal date:

Resp Center:8

9Customer:

Customer Search

10Description:

- 1. Orders Name
- 2. Scope
- 3. Order Type
- 4. Effective Date
- 5. Pop From
- 6. Pop To
- 7. Proposal date
- 8. Resp Center
- 9. Customer
- 10. Description

Financials

FINANCIALS

1 Fixed Price Cumulative:10000\$

2 Cost Cumulative:5000

3 Fee Cumulative:1000\$

4 Total Cumulative:16000

5 Obligated Amount:5000

6 Amount:100000\$

7 Notification:2017-06-14

8 Percentage:50%

1. Fixed Price Cumulative
2. Cost Cumulative
3. fee Cumulative
4. Total Cumulative
5. Obligated Amount
6. Limit of Funds Amount
7. Limit of Funds Notification
8. Limit of Funds Percentage

Decentralized Order

DECENTRALIZED ORDER

1 Payment Office:Fred

2 Contract Administrator:Andrew

3 Contract Admin Backup:Thomson

1. Payment Office
2. Contract Administrator
3. Contract Admin Backup

Contracting Officer

CONTRACTING OFFICER

#

Name1

1

Michel Clark

Clear

2

Fred

Clear

3

Contracting Officer Search

Done

1. Name

Account Manager

ACCOUNT MANAGER

#

Name1

1

Michel Clark

Clear

2

Andrew Flintop

Clear

3

Account Manger Search

Done

1. Name

Security

SECURITY

1☒ Required

2 Security Requirement NotesNotes

1. Required
2. Security Requirement Notes

Step 5: Click on save button.

New order will be created and saved

9 How to add a modification to an order?

Step 1:View the program to which modification needs to be added

Step 2: Navigate to the order tab

Step 3: Open the order to which modification needs to be added

Step 4: Navigate to the modifications section

Step 5: Click the “new” button. This will open the new modification form

Step 6: Fill following sections

Details.

New Modifications of 22151

Save

Cancel

DETAILS

1 Name*:

Scope:2

select an option

3 Order Type:

select an option

Change Type:4

select an option

5 Pop From:

Pop To:6

7 Proposal Date:

Effective Date:8

1. Name

2. Scope

3. Order Type

4. Change Type

5. Pop From

6. Pop To

7. Proposal date

8. Effective Date

Financials

FINANCIALS		
Field1	Amount2	Adjustment3
Fixed Price:	<div></div> \$	<div>select an option</div>
Cost:	<div></div> \$	<div>select an option</div>
Fee:	<div></div> \$	<div>select an option</div>
Obligated:	<div></div> \$	<div>select an option</div>

1. Field

2. Amount

3. Adjustment

Changes Made

1 CHANGES MADE

2☐ Add/Change Funding Data

☐ Administrative Change

☐ Change PoP

☐ Change Scope/SOW

☐ Incorporate Proposal

☐ Option Exercise

1. Change Made

2. Check Box

Step 7: Click on save button.

New order will be created and saved

10 How to upload a new document to a program?

Step 1:Viewthe program to which document needs to be added

Step 2:Create a new folder or select an existing folder

DOCUMENTS FOLDERS

1

Funds

Legal

1. New Folder

Step 3:Choose file(s)

NEW FILE

1

Choose Files

No file chosen

2 Name

Size3

Status4

Actions5

Upload all

Stop

1. Choose File

2. Name

3. Size

4. Status

5. Actions

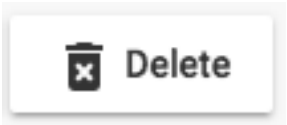
Step 4: Click “Upload All” button

The application starts uploading and updates the status of each file.

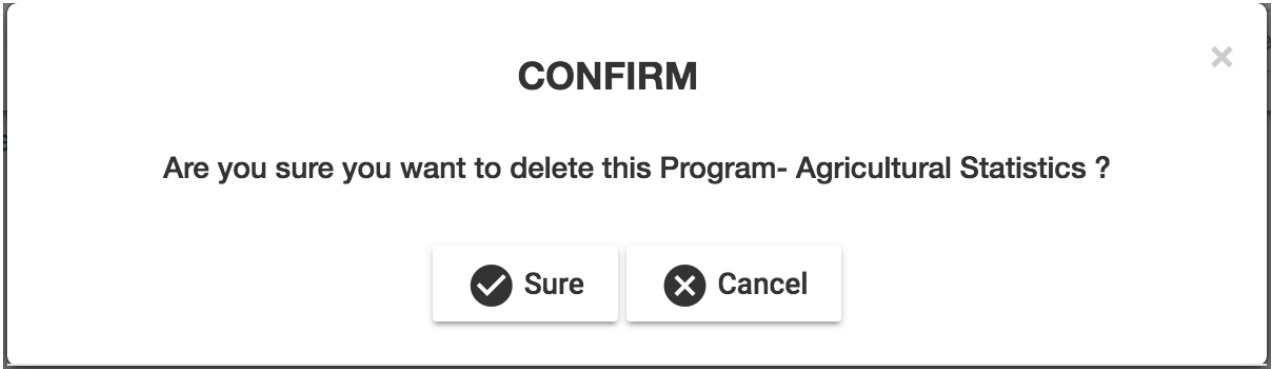
11 How to remove a program?

Step 1: Open the program which you want to delete.

Step 2:Click the “delete” button at top of the program.



Step 3:A conformation message pops up. Click “Sure” button.



This would remove the program from all the application.

12 How to manage data in auto complete fields?

Use settings to manage users, contacts and places across the application



- 1. Users
- 2. Contacts
- 3. Places

12.1 Managing Users

12.1.1 Viewing list of users

USERS						
SNo.	Name 1	Login 2	Mobile 3	Email 4	5 Type	Last Login 6
1	Dean Clark	dean.newport	+919856456465	justin@gmail.com	Admin	6/21/2017, 4:01 PM
2	Niks	applego.111	+5555551234	niks@msn.com	Legal	6/12/2017, 11:56 AM
3	Ulx.Legal1	ulx.legal1	8787878909	ulx.legal1@test.com	Legal	6/8/2017, 6:45 PM

- 1. Name
- 2. Login
- 3. Mobile
- 4. Email
- 5. Type
- 6. Last Login

12.2 Managing Contacts

12.2.1 Viewing Contacts

CONTACTS				
#	Name 1	Email 2	Telephone 3	Address 4
1	Andrew Flintop	Andrew.Contact@Gmail.Com	9876543210	Roland Witvoet , Richard Paul, Liza R, 110003, India
2	Fred	Fed_1@Gmail.Com	+14589345869	New Street , Wyllas, Paris, 75020, France
3	Michel Clark	Michel@Gmail.Com	310-775-2525	Ciudad Colonial (Santo Domingo), San Juan, Montserrat, 00801, West Indies

- 1. Name
- 2. Email
- 3. Telephone
- 4. Address

12.2.2 How to add a new contact?

Step 1:Open the contacts tab in settings

Step 2:Click “New” button to open the form

Step 3: Fill in details.

NEW CONTACT

1 First Name*

2 Last Name:

3 Email*:

4 Telephone*:

5 Street:

6 City:

7 State:

8 Postal Code:

9 Country:

Country Search

1. First Name
2. Last Name
3. Email
4. Telephone
5. Street
6. City
7. State
8. Postal Code
9. Country

Step 4:Click the “Save” button
This will add the new contact

12.3 Managing Places

12.3.1 Viewing places

PLACES			
#	Name	1	
1	Alaska	2	Edit Delete
2	Arizona		Edit Delete



How to add a new place?

- Step 1 Open the places tab in settings
- Step 2 Click “New” button to open the form
- Step 3 Fill in details.

NEW PLACES

Name*:

Save

Cancel

1. Name

1. Name
2. Edit/Delete

Step 4 Click the “Save” button
This will add the new place

Appendix

• Advance Filter Options

- 1. Phase
- 2. Contract Type
- 3. Subcontract
- 4. Prime Contract
- 5. Program Number
- 6. Contract Id
- 7. RFP#

• Program Phases

- | | | |
|----------------------------|----------------------|------------------------|
| 1. Active | 10. Error | 19. Processed |
| 2. Approved | 11. Inactive | 20. Proposal |
| 3. Approved (Pending) | 12. Locked | 21. Re-Open |
| 4. Cancelled | 13. Lost | 22. Rejected |
| 5. Cancelled (Pending) | 14. Not Submitted | 23. rejected (Pending) |
| 6. Close | 15. Open With IT | 24. Reopen |
| 7. Close - Out | 16. Open-OLD | 25. Research Pending |
| 8. Closed | 17. Pending Approval | 26. Submitted |
| 9. Contract Administration | 18. Pre-Proposal | |

• Contract Types in a Program

- | | | |
|----------------------|---------------------------|--------------------------|
| 1. Time and Material | 7. Fixed Price | 13. Cost reimbursable |
| 2. Level of efforts | 8. Level of efforts | 14. cost plus incentive |
| 3. Letter Contract | 9. Firm Fixed with EPA | 15. Cost plus Fixed fees |
| 4. Labour hours | 10. Firm Fixed Price | 16. Cost plus Award fees |
| 5. IDIQ | 11. Firm fixed Incentives | |
| 6. Fixed Unit Price | 12. Cost sharing | |

• Service Offerings in a Program

- | | | |
|------------------------------------|---|----------------------------|
| 1. Applications Development &Mgt | 8. E Communities | 14. Midrange |
| 2. Applications Maintenance | 9. Enterprise Customer Management | 15. Procurement |
| 3. Asset Mgt and Maintenance | 10. Health Care Finance Administration (HCFA) | 16. Project Support |
| 4. Business Continuity | 11. Help Desk | 17. Telecommunications |
| 5. Claims or Settlement Processing | 12. Internet Solutions & Applications | 18. Training and Education |
| 6. Consulting | 13. Mainframe | |
| 7. Desktop/Client Server | | |

• Corporate CAGE Codes

- 1. 05HD8
- 2. 1U305
- 3. 0CVK8
- 4. 24612
- 5. 00MK8
- 6. TBD
- 7. 1D6O3
- 8. 4TJT0
- 9. 39500000

• Corporate Locations

- 1. 5400 Legacy Drive, Plano, TX
- 2. 13600 EDS Drive, Herndon, VA
- 3. 225 Grandview Ave, Camp Hill, PA
- 4. 1600 North Beauregard Street, Alexandria, VA
- 5. 7900 Westpark Dr, T-600, McLean, VA
- 6. Falls Church, VA
- 7. 4646 Needmore Rd, P.O. Box 24593, Dayton, OH 45424
- 8. SafeGuard Services
- 9. NHIC

• Affiliation Types

- | | | |
|---------------------|---------------------|---------------------|
| 1. Default | 7. is a cross clai | 13. is subpoena for |
| 2. is a third part | 8. is a master agr | 14. is a cross refe |
| 3. is an addendum | 9. is a master cas | 15. is an order und |
| 4. is a counter cl | 10. is a related cl | 16. is related to |
| 5. is a consolidate | 11. is a related is | |
| 6. is consolidated | 12. is the same iss | |

• Contact Types

- 1. Awarding agency
- 2. Govt. POC
- 3. Contractor
- 4. Payment Office

• Terms and Conditions

- | | | |
|---|---|--|
| <ul style="list-style-type: none">1. Products2. Financial3. Performance4. Security5. Corp. Risk6. Key Issues7. Other8. Unusual Terms/Conditions9. Subcontracting10. Key Personnel11. Service Contract Act12. No Hire/No Solicitation Clause13. Other (Labor)14. Buy American Act/Trade Agreement Act15. New Materials Clause16. Discounted Products/Technology Refreshments17. Special Test Equipment Required18. Customer Paying For Development of Product(s)19. EDS Retains Ownership of Products20. Other (Products)21. Cost or Pricing Data Required22. Defective Pricing Clause23. Caps On Indirect Rates24. FCCOM Allowed25. Economic Price Adjustment Clause26. FAR Penalty Clause (52.242-3)27. Precontract or Cost Allowable Restrictions28. Costs Specifically Unallowable By Contract Terms29. Profit or Fee Provisions In The Contract30. CAS Clauses (FARs 52.230-1 thru 52.230-6) | <ul style="list-style-type: none">31. SEI/CCM Applicability32. ISO 9000 Applicability33. Warranty Provisions34. Cancellation Provisions35. Liquidated Damages36. Government Property37. Engineering Changes/Value Engineering Changes38. Other (Performance)39. Security Clearances40. DD 25441. Non-Publicity42. Other (Security)43. System Development With Fixed Or Capped Pricing44. Customer With Credit Risk45. Contractual Financial Performance Penalties46. Payment Terms > 45 Days After The Month of Service47. Pricing Adjustments Using Benchmarks, etc.48. Most Favored Customer Provisions49. Non-competition or Other Exclusivity Provisions50. Economic and Monetary Union (EMU) Compliance51. Year 2000 Compliance52. Costing Based On Non-Std Infrastructure Charges53. Media Release Restrictions54. Rights in Technical Data/Computer SW55. Incorporation of Sections K, L and/or M56. Commercial Terms and Conditions57. Corporate Agreements Applicable | <ul style="list-style-type: none">58. FOIA Copies Required59. Show Cause Provision60. Cure Notice Provision61. Other (Key Issues)62. Truth in Negotiations Act (TINA)63. Cost Sharing (Identify Terms of Arrangement)64. Level of Effort (Identify Limitations)65. Overtime Restrictions (FAR 52.222-2)66. Restrictions or Special RegtsFor Subcontracts67. Other Special Provisions/Limitations68. Restrictions on Subcontracting69. Notification and/or Consent Requirements70. Subcontracting Plan Required71. Subcontracting Plan Not Required72. List of Subcontractors73. Organizational Conflict of Interest Potential74. TINA-FAR 52.215-1075. TINA-FAR 52.215-1176. TINA-FAR 52.215-1277. TINA-FAR 52.215-1378. Labor79. Key Personnel80. Service Contract Act81. No Hire/No Solicitation Clause82. Other (Labor)83. CAS Clauses FAR 52.230-584. CAS Clauses FAR 52.230-485. CAS Clauses FAR 52.230-686. CAS Clauses FAR 52.230-187. CAS Clauses FAR 52.230-288. CAS Clauses FAR 52.230-3 |
|---|---|--|

• Order Scope

- | | | |
|--|--|---|
| <ul style="list-style-type: none">1. TBD2. Certification and Deployment Procedures3. Year 2000 efforts4. Product Delivery5. Telecommunication6. Cable installation7. Program/facilities modernization8. Infrastructure Services9. Installation10. Logistics11. Loan processing/management systems12. Information Assurance13. Hardware | <ul style="list-style-type: none">14. Consulting services15. Center outsourcing16. Site surveys and/or design17. Network management18. Personnel systems19. Seat Management20. Integrated Data Environment (IDE)21. Software22. Facilities management23. Emergency Management24. Outsourcing25. Systems engineering26. Medical information systems | <ul style="list-style-type: none">27. Intel28. Intranet/Internet design and/or management29. Hardware/Software30. Data processing31. Distance Learning32. Warranty and maintenance33. Training34. Intranet/Internet/Web design and/or management35. Program management36. Call center/help desk37. Software development |
|--|--|---|

• Order Type

- | | | |
|--|--|--|
| <ul style="list-style-type: none">1. Fixed Unit Price2. Cost Plus Incentive3. Level of Effort4. Time and Materials5. Cost Reimbursable | <ul style="list-style-type: none">6. Firm Fixed Price7. Cost Plus Fixed Fee8. Fixed Price, Level-Of-Effort9. Letter Contract10. Firm Fixed Incentive | <ul style="list-style-type: none">11. Firm Fixed with EPA12. Cost Plus Award Fee13. Cost Sharing14. IDIQ15. Labor Hour |
|--|--|--|